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TO: Distribution DATE: July 22, 1996

FROM: Market Information / Bruce Neidle

SUBJECT: INTEGRATED WEEKLY NIELSEN REPORT-WEEK ENDING 7/13/96

ALL OUTLETS COMBINED

PM's share declined -0.1 point this week to 49.8%, as Marlboro's slight gain was more than offset by Basic and other PM Discount losses. PM's positive performance in c-stores and supermarkets (likely influenced by continued MUBSS implementation) was overshadowed by losses in drug stores and mass merchandisers. These losses corresponded with the completion of the Summer Special program in major chains including Wal-Mart (PM down -2.6 points in Wal-Mart following a +4.2 point increase in the prior four weeks). The Discount category fell -0.3 points week-to-week to 26.2%, with Basic and RJR PL incurring the largest weekly losses (down -0.1 point each). Among the major competitive premium brands, Newport posted the largest gain versus week-ago, up +0.2 points to 5.1% (its highest weekly share level to date). Newport's retail promotional activity was relatively unchanged.

- PM's share declined -0.1 point week-to-week to 49.8%, with Marlboro's slight gain offset by PM Discount losses.
  - After establishing record levels in the past three weeks, PM's share in drug stores and mass merchandisers declined -0.2 and -2.3 points versus week-ago to 51.3% and 59.0%, respectively.
- Marlboro's share increased slightly this week (+0.1 point) to 33.6% (from 33.6% last week due to rounding), with the gain concentrated in c-stores and supermarkets.
- OPB's share was unchanged this week at 9.0%.
- After three consecutive weekly gains, Basic's share of industry and share of category declined -0.1 point each to 4.8% and 18.3%, respectively.
- The Discount category trailed week-ago by -0.3 points to 26.2%, with Basic and RJR PL accounting for the majority of the loss.
  - RJR PL's share declined -0.1 point to 3.2%, its lowest level since w/e 12/30/95.
- Among the major competitive premium brands, Newport and Camel posted the largest week-to-week gains (+0.2 and +0.1 points, respectively).

JULY RETAIL SHARE PROJECTION

	PM-USA			MARLBORO		
Period	Proj.	Actual	Actual Vs. Proj	Proj.	Actual	Actual Vs. Proj
June		49.5			33.4	
7/6/96	49.9	49.9	0.0	33.9	33.6	-0.3
7/13/96	49.8	49.8	0.0	33.8	33.6	-0.2
7/20/96	49.6			33.7		
7/27/96	49.4			33.6		
MTD	49.8	49.8	0.0	33.8	33.6	-0.2

EXPLANATION

7/13/96	Share in c-stores and supermarkets likely influenced by continued MUBSS money-off support.
7/6/96	Share likely influenced by continued implementation of the MUBSS money-off program and "first week of the month" dynamics.

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Source: https://www.industrydocuments.ucsf.edu/docs/yhgn0004

INTEGRATED WEEKLY NIELSEN REPORT
July 22, 1996

CONVENIENCE STORES

Reversing last week's slight decline, PM posted a +0.1 point share gain to 50.6%. Marlboro advanced +0.3 points versus week-ago to 35.7% (its highest level since w/e 5/11/96), likely benefiting from continued MUBSS money-off support. The Discount category declined -0.4 points to 26.5%, following last week's "first week of the month" increase. RJR PL incurred the largest week-to-week discount loss, down -0.2 points to 3.8%. Among the major competitive premium brands, Newport realized the largest weekly gain, up +0.3 points to 5.8% (its highest weekly level to date). Newport's share gain did not correspond with any discernible shift in its retail promotional support.

- PM's share advanced +0.1 point this week to 50.6%, as Marlboro's gain more than offset OPB and Cambridge declines.
- Marlboro's share was up +0.3 points week-to-week to 35.7%, likely benefiting from continued MUBSS money-off support (incidence fell -3 points from last week's peak to 38% of c-stores).
- PM OPB's share declined -0.1 point versus week-ago to 7.9%, with B&H and Merit accounting for the loss.
- Basic's share was relatively stable this week at 4.9% (down from 5.0% last week due to rounding), while its share of the Discount category increased +0.2 points to 18.6%. Basic was likely influenced by continued money-off support from the MUBSS program (incidence was at 30% of c-stores for the third consecutive week).
- The Discount category declined -0.4 points versus week-ago to 26.5%. Among the major discount entries, GPC, Misty, Cambridge and RJR PL incurred the largest week-to-week losses.
- Among the competitive premium products, Newport, Camel and Vantage posted the only weekly share gains (of at least +0.05 points).
  - After building to year-to-date high levels in the past two weeks, Camel's money-off incidence fell -4 points to 41% of c-stores.

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